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## Paperless Environments and Web Portals

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Clients consistently request customization and higher levels of technology in all businesses. By implementing a paperless environment and web portals, clients will be able to utilize this service as their safety deposit box for document storage.

As technology evolves, various types of personal computers have been installed. However, you, like many may, upgrade 'kicking and screaming' until forced into by support deadlines in software! During the 80's, were DOS versions; however, as Windows became the prevalent business operating system, many were forced to upgrade hardware and software to accommodate memory needs for color and graphics.

Numerous businesses have implemented paperless working environments. However, some main concerns are: When to scan documents; who scans the documents; what directories are needed and how to set them up; dual monitors may be needed.

Many businesses keep volumes of paper either onsite or at an off-site storage facility. An Excel database of each box's contents by number, date and name is created, enabling destruction of files by year.

There are software programs, which can be set up to scan documents into appropriate directories for further processing. Some programs may create directories and file folders during the print process and offer OCR functionality.

According to Glen Keenan, CPA, in a special report of Small Business Services, "Adopting technologies to scan, store, and electronically organize paper files and other important documents are key factors," referring to a paperless process. However, he goes on to say it's only half of the process; the other half centers on standardizing internal procedures and firm-wide best practices.

Secure web portals enable clients to have a centralized location to store their documents and have access 24/7. This service could be very beneficial to a client who may be abroad and suddenly finds himself in the hospital needing his living will or list of medications, etc.

According to Roger Mongeon's article, *Web Portals Compliment Accountants Serving Small Business*, "Clients will gradually increase their use of Web storage. They will grow increasingly comfortable with the convenience of retaining and exchanging business-critical documents with their accounting firm via the Web portal."

Levin, Silvey, Zelko & Mackey, P.A. is a local CPA firm, located in Hollywood, Florida. In keeping with our mission ([www.lszcpa.com](http://www.lszcpa.com)), we focus on financial statements, tax returns and new businesses. These are the keys to assisting our clients with their financial, tax and estate needs.

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